

TOWN OF ARLINGTON

COMMUNITY PRESERVATION PLAN

Draft of Plan for Town Meeting – Spring 2016

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INTRODUCTION

COMMUNITY PRESERVATION COMMITTEE:

Clarissa Rowe (Chair) - Board of Selectmen Appointee
Eric Helmuth (Vice Chair) – Board of Selectmen Appointee
Andrew Bengtson – Board of Selectmen Appointee
Michael Cayer – Redevelopment Board
David Levy – Board of Selectmen Appointee
Leslie Mayer – Park & Recreation Commission
Richard Murray – Housing Authority
JoAnn Robinson - Historical Commission
Chuck Tirone – Conservation Commission

We are excited to present Arlington's Community Preservation Plan. The Plan contains information about the Community Preservation Act (CPA), which Arlington voters approved adoption of in November 2014. The goal of the Plan is to provide a summary of the Town's resources and needs, define the goals and objectives of the Community Preservation Committee, and outline the CPA funding application process.

The Town of Arlington is privileged to have many important community assets. Preserved open space areas contain a scenic beauty that predates the Town itself. Historic resources provide a glimpse into Arlington's past, a way of measuring our progress throughout the years, and perhaps an insight as to where the Town is headed. Recreational land provides a safe place to enjoy community-based activities and games, thereby strengthening the health and well-being of all its residents. Community housing allows a greater range of people to benefit from all aspects of Arlington, people who would otherwise not have the opportunity to contribute to the future of the Town.

In the following Community Preservation Plan, Arlington residents will find more information on the Community Preservation Act, potential areas of focus for future CPA projects, the requirements for CPA funding eligibility, and the funding application process. A revised Plan is likely to be presented to the Town every year to reflect new CPA projects and updated annual financial statements. Public hearings will be scheduled each year to solicit feedback from residents who wish to participate in the development of each new Plan.

We invite you to submit any comments or suggestions for the Plan to EMargolis@town.arlington.ma.us or to:

Community Preservation Committee
c/o Adam Chapdelaine, Town Manager
Town of Arlington, 730 Mass Ave.
Arlington, MA 02476

Respectfully submitted,
The Community Preservation Committee

THE COMMUNITY PRESERVATION ACT IN ARLINGTON

What is the Community Preservation Act?

The Community Preservation Act (CPA) allows participating cities and towns to reserve dedicated funds for the purpose of expanding certain community assets: open space/recreational land, historic resources, and community housing. The acquisition, creation and preservation of these community assets is financed through the Community Preservation Fund, which is comprised of revenues collected from a property tax surcharge of up to 3% and annual distributions from the Massachusetts Community Preservation Trust Fund.

When did Arlington adopt the CPA?

Arlington voters approved adoption of the Community Preservation Act (CPA) in November 2014 with the Act to begin funding projects in FY2017. The Town of Arlington began collecting surcharge revenue on the August 3, 2015 tax bills and will continue collection on a quarterly basis.

What is the average taxpayer cost?

The vote approved a 1.5% surcharge on the net property taxes. The following will be exempt from the surcharge:

- \$100,000 of the value of each taxable parcel of residential real property
- Property owned and occupied as a domicile by any person who qualifies for the low income CPA exemption*
- Property owned and occupied as a domicile by any senior (60+) who qualifies for the low or moderate income CPA exemption*
- \$100,000 of the value of each taxable parcel of class three, commercial property and class four, industrial property as defined in section 2A of said Chapter 59.

Residential and mixed use properties in Arlington receive an automatic exemption for up to \$100,000 off of the residential property value. Residents who qualify as having low/moderate income can receive a full CPA surcharge exemption. More information regarding the low/moderate income CPA exemption can be found through the Assessors' Office or by visiting their page on the Town's website at <http://arlingtonma.gov/departments/assessor/community-preservation-act-cpa-surcharge>

Formula for calculating CPA surcharge

$$((\text{FY Assessed Value} - \$100,000) \times (\text{FY Tax Rate}/1,000) \times 1.5\%)$$

Example using FY 2015 median single family value & tax rate

$$((\$539,152 - \$100,000) \times (\$13.55/1,000) \times 1.5\%) = \$89.26^1$$

¹ This is the total amount for the Fiscal Year to be divided quarterly

What other revenue sources contribute to Arlington's CPA fund?

The Massachusetts Community Preservation Trust Fund was established to provide an additional source of revenue for communities that chose to adopt the CPA. The state uses multiple rounds of distribution to determine how much each participating community will receive from the Community Preservation Trust Fund. Each community is eligible to receive no less than 5%, but no more than 100%, of the total surcharge assessed the previous year.

The State match, originally 100% of CPA funds collected by municipalities during the previous fiscal year, has declined since 2006 as additional communities have adopted the statute and joined the funding pool, and as registry fees which feed the State fund have suffered in a weak economy. The

increase in the state match during FY 2013 through FY 2016 was due to a transfer of funds from the State Budget Surplus.

For FY 2016, the State match was 29% with a \$10 million addition from the legislature, and the State match for FY 2017 is projected at 22%. The FY 2017 State match is expected to be calculated and disbursed to all participating municipalities in the Fall of 2016.

What is the current balance of Arlington's CPA Funds?

* Preliminary estimates to be updated at the close of FY 2016.

Estimated Fund Balance for FY 2017 \$1,586,000

Each year the Community Preservation Committee (CPC) requests Town Meeting to approve the annual CPA budget, which consists of projected revenues and expenses. The projected revenue is based on conservative estimates of the Town's projected CPA collection for the following fiscal year, including the projected State match as described in the previous section of this document. Although the true CPA collection is not determined until the end of the following fiscal year, the annual appropriation is considered part of the working CPA Fund Balance once it has been approved by Town Meeting.

What are the spending guidelines for CPA funds?

For each fiscal year, the community must spend or reserve at least 10% of the annual revenues in the fund for each of the following resources: Open Space/Recreational Land, Historic Resources, and Community Housing. Up to 5% of the annual revenue can be used for administrative, planning and operating expenses associated with the Community Preservation Committee. Administrative funds cannot exceed 5% of the annual CPA revenue and do not roll over to the subsequent fiscal year administrative budget. The remaining revenue is considered undesignated, and can be used towards any of the three community asset categories.

What is the Community Preservation Committee?

The Community Preservation Committee (CPC) was formed to evaluate the community preservation needs of Arlington and make recommendations to Town Meeting as part of the annual budget process. Sponsors of community projects must receive approval from both the CPC and Town Meeting in order to receive funding for their particular community preservation purposes. The CPC consists of nine members, comprised of representatives from the Conservation Commission, Historic District Commission, Redevelopment Board, Park & Recreation Commission, the Housing Authority and four members appointed by the Board of Selectmen.

The current members of the Community Preservation Committee are as follows:

Clarissa Rowe (Chair) - Board of Selectmen Appointee; Eric Helmuth (Vice Chair) – Board of Selectmen Appointee; Andrew Bengtson – Board of Selectmen Appointee; Michael Cayer – Redevelopment Board; David Levy – Board of Selectmen Appointee; Leslie Mayer – Park & Recreation Commission; Richard Murray – Housing Authority; JoAnn Robinson - Historical Commission; Chuck Tirone – Conservation Commission

What is the goal of the Community Preservation Committee?

The Community Preservation Committee strives to help Arlington preserve the Town's precious assets through CPA funding. The CPA fund is a powerful resource that can be used to maintain the character of Arlington, but doing so requires active members of the community to sponsor CPA eligible projects. With this in mind, the Community Preservation Committee encourages Arlington residents to spearhead their own community-based projects that uphold the integrity of our community.

What guidelines will determine a project's eligibility for CPA funds?

In determining which projects should receive CPA funding, the CPC will give preference to projects that meet one or more of the following criteria:

- Preserve or utilize currently owned Town Assets.
- Preserve the essential character of the Town as described in the Master Plan.
- Demonstrate consistency with other current and widely scrutinized planning documents that have been adopted by the Town of Arlington (such as *Your Town, Your Future: A Master Plan for Arlington (2015)* and the *Town of Arlington Open Space and Recreation Plan, 2015-2022*).
- Receive endorsement from other municipal boards or departments.
- Save resources that would otherwise be threatened.
- Benefit a currently under-served population.
- Serve more than one CPA purpose.
- Demonstrate practicality and feasibility (especially those that can be expeditiously implemented within budget).
- Produce an advantageous cost/benefit value.
- Leverage additional public and/or private funds.
- Provide long-term contributions to the Town.

Open Space

Overview

The Town of Arlington is a densely populated suburban community with few large open natural “green” spaces remaining within its borders and limited direct access to open space resources in adjacent towns. Arlington residents recognize and deeply feel a need to preserve, protect, and properly maintain existing undeveloped spaces that provide walking, wildlife viewing, and other passive recreational opportunities. Direct exposure to nature is essential for healthy childhood development and for the physical and emotional health of children and adults. Open spaces serve as an outdoor classroom where residents of all ages learn about nature and see firsthand ecological principles taught in Arlington’s schools and by local and regional environmental organizations. Many open spaces are also valued for their function in providing flood control and wildlife and fisheries habitat. The Town of Arlington has a State-approved Open Space and Recreation Plan (OSRP) for the years 2015-2022. The Town's first OSRP was prepared in 1996, covering the years 1996-2001 and was followed by plans for the periods 2002-2007, then 2007-2014. The information contained in this CPA Plan is based on the most current OSRP.

Resources

Currently Arlington has more than 550 acres of publicly held open space, which includes Arlington’s Great Meadows and some of the land surrounding the Arlington Reservoir, owned by Arlington and located in the Town of Lexington. An additional 118 acres are privately owned, of which the Winchester Country Club, Belmont Country Club, Arlington Catholic High School Field, and Kelwyn Manor Playground are the only parcels used for recreation. Of those, only the Winchester Country Club is open to the public for a fee.

Key open space sites, include:

Corridors and Greenways

- Alewife Brook Reservation and Greenway
- Minuteman Bikeway
- Mill Brook
- Mystic River

Open Spaces

- Arlington's Great Meadows
- Mount Gilboa
- McClennen Park
- Turkey Hill Reservation
- Wellington Park
- Symmes Woods and Parks
- Cooke's Hollow
- Meadowbrook Park and Mt. Pleasant Cemetery
- Mystic Lakes
- Window-On-The-Mystic
- Mugar Land
- Spy Pond, Elizabeth Island, and Kelwyn Manor Park
- Menotomy Rocks Park

Needs and Goals

The Town continues to face serious management, staffing, and financial challenges to address the diverse needs for conservation land, parks, playgrounds, and outdoor sports facilities. Progress has been made over the past seven years to enhance several key sites, and several new volunteer Friends groups have been formed to advocate and raise funds for specific parks. However, the Town also needs to develop a stronger town-wide open space management program and incorporate regional solutions to meet the competing demands of many different constituencies.

The 2015 OSRP presents an expanded inventory of Arlington's open spaces, documents open space and recreation needs, and establishes open space aspirations. Arlington's natural environment is a precious and limited resource that has been difficult to acquire and maintain, and it needs to be protected ardently. Arlington's OSRP presents open space goals, objectives, and actions that will guide Arlington's open space philosophy, planning, and management through 2022 and help guide planning for CPA project funding.

- Acquire ecologically valuable undeveloped lands or ensure their protection through conservation restrictions or other means.
- Preserve, maintain, and enhance existing open spaces, including watersheds, water bodies, and natural areas; parks, playgrounds and outdoor recreational facilities; and historic sites and cultural landscapes.
- Coordinate and strengthen local and regional planning and management of open spaces in conjunction with various Town departments, commissions, and volunteer groups, and work closely with nearby towns and regional entities and with state and federal officials and agencies.
- Increase public awareness, accessibility, and community stewardship of the Town's open spaces and recreational facilities.
- Use environmentally sustainable planning and engineering approaches for climate change and natural resources management.

Considering the significant role open space plays in our community, one of the goals of the CPC is to use the Community Preservation Funds to positively affect all aspects of open space in Arlington. From large conservation lands to smaller vistas, open space has helped to define Arlington throughout the years. By taking advantage of available CPA funds, it is hoped that open space will continue to shape the character of our Town.

Possible Areas of Focus

The following is an initial, unapproved list of potential projects for CPA funds, as highlighted in the Town's OSRP. These are not listed in any particular order or preference at this point.

- Control of invasives and erosion at the Arlington Reservoir, Hill's Pond/Menotomy Rocks Park, Spy Pond and McClenen Park
- Permanent protection of Arlington's Great Meadows
- Enhancement of the Mill Brook corridor
- Repair and renovation of Winfield Robbins Memorial Garden
- Acquisition or protection of Mugar land

Specific Selection Criteria

In order to receive CPA funding, an open space project should acquire, create or preserve:

- Land that is undeveloped.

- Land that is considered open space.
- Land containing natural resources, including: surface water bodies, wetlands, vernal pools and riparian zones, other lands subject to the Town of Arlington Wetlands Protection Bylaw and state Wetlands Protection Act.
- Land of habitat or wildlife significance.
- Land with unique or significant geologic features.
- Land adjacent to existing open space or conservation lands that may promote connectivity of habitat; protect or enhance wildlife, water, and human corridors; provide a buffer for existing open space.
- Land connecting open spaces, such as bike trails or pedestrian paths.
- Land that provides flood control or water storage, especially land bordering Arlington's ponds, rivers and streams and their watersheds.
- Land that could provide pollution control.
- Land that has historic significance, is scenic, provides scenic vistas, protects the character of the Town, or that meets the Town's recreation needs.
- Land that creates pocket parks in densely settled areas of the Town, especially where they are currently scarce.
- Land that is listed in the Open Space and Recreation Plan.

Funded Projects

There are no past or current open space projects in Arlington that have been awarded CPA grant funding.

Administrative Projects

There are no past or current open space projects in Arlington that have been awarded CPA grant funding.

Recreational Land

Overview

Recreational land plays a significant role in making Arlington a desirable town for current and prospective residents. Parks, playgrounds and playing fields provide a venue for numerous community-based programs to thrive and for the ad hoc enjoyment of families, friends and neighbors. The existence of dedicated public recreation spaces encourage people of all ages, interests and abilities to pursue healthy lifestyles and to be actively engaged in their community. Recreational land continually succeeds in fostering meaningful social opportunities and connections in Arlington.

Resources

Major Outdoor Recreational Facilities, include:

- Arlington Reservoir Beach and walking trail
- Hurd/Reservoir Fields
- McClellen Park
- Turkey Hill Reservation
- Summer Street Sports Complex (Hill's Hill, Buck and Robillard/Summer St. fields)
- Wellington Park
- Buzzell Fields
- North Union Park/Lussiano Field
- Thorndike and Magnolia Park and Fields
- Spy Pond Park and Fields
- Menotomy Rocks Park
- Robbins Farm Park
- Poets Corner
- Warren A. Peirce/Arlington High School Athletic Fields
- Minuteman Bikeway
- Parks and playgrounds adjacent to Arlington schools

Needs and Goals

Changing demographics in Arlington over the past decade have altered the need for and demands on limited public resources for many outdoor recreation, physical fitness, and sports facilities, such as the Minuteman Bikeway, playing fields, playgrounds, and other sites. Residents also regularly express their desire for more natural green spaces for walking, bird watching, and other contemplative pleasures.

Possible Areas of Focus

The following is an initial, unapproved list of potential projects for CPA funds. These are not listed in any particular order or preference at this point.

- Continue to upgrade the physical condition of playing fields and other outdoor recreational facilities per the Capital Plan of the Arlington Park and Recreation Commission.
- Renovations at Robbins Farm Park, including field, community garden, accessibility and reintroduction of historic elements
- Create and implement a master plan for renovations at Arlington Reservoir Beach.
- Renovations at Hurd/Reservoir Fields
- Improved access to Turkey Hill Reservation
- Master plan for renovations at Poet's Corner
- Improve safety and amenities for the Minuteman Bikeway
- Town-wide ADA compliance upgrades at various recreation sites.

Specific Selection Criteria

In order to receive CPA funding, a recreational land project should acquire or preserve:

- Land that has recreational value, historic significance, enhanced scenery, or ecological contribution to Arlington residents.
- Land that is contiguous to a recreation site and/or structure.
- Land that may offer protection to wildlife within the recreation site.
- Land that connects the recreation site to open space or public access.
- Land that enhances the public spaces surrounding a recreation site and/or structure.
- Land that provides flood control and/or water storage at a recreation site and/or structure.
- Land that acts as a natural buffer to a recreation site and/or structure.

Funded Projects

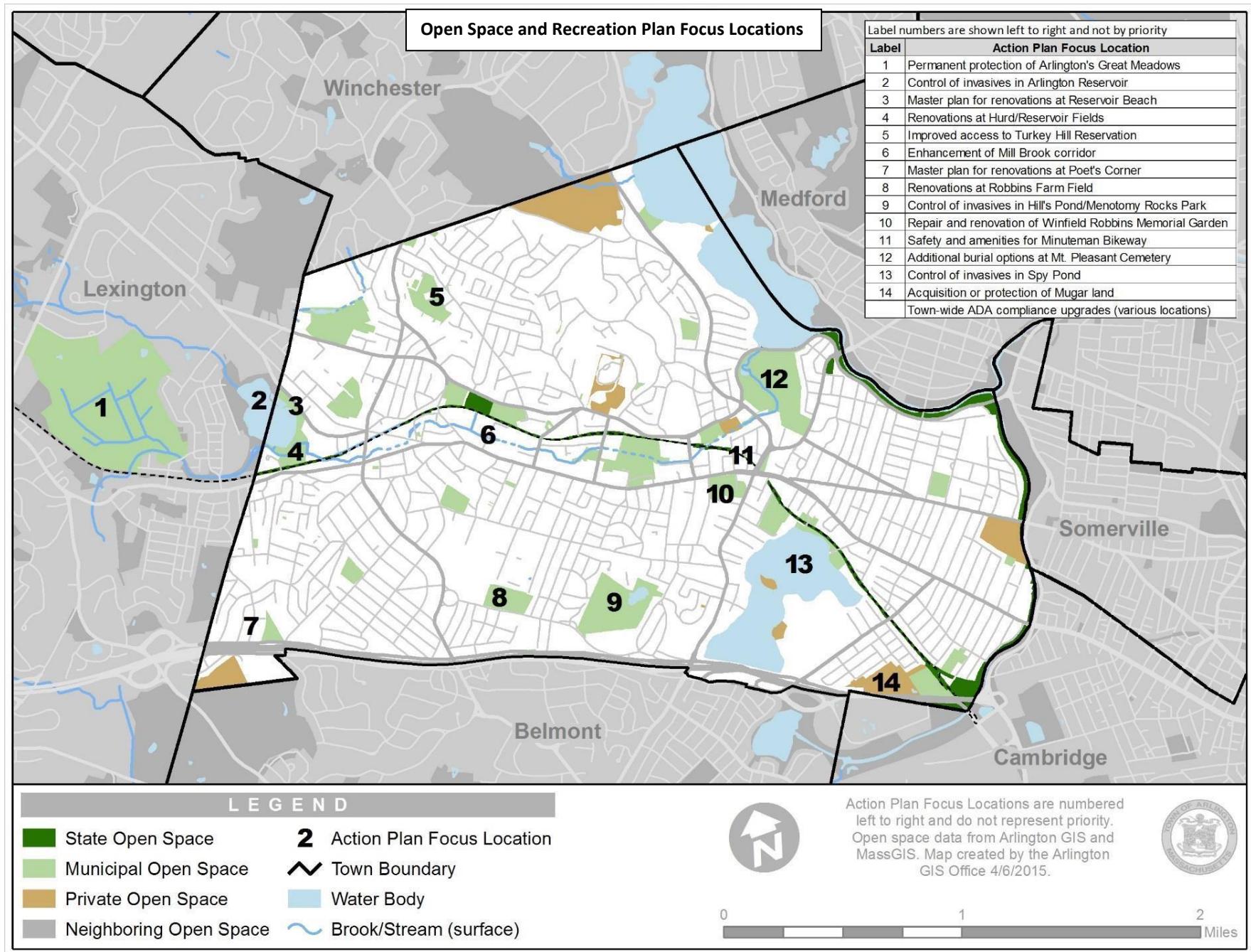
There are no past or current recreation projects in Arlington that have been awarded CPA grant funding.

Administrative Projects

There are no past or current recreation projects in Arlington that have been awarded CPA grant funding.

Detailed project descriptions and expense summaries for all Town Meeting approved projects can be found on the CPC webpage on the Town of Arlington website:

<http://www.arlingtonma.gov/town-governance/all-boards-and-committees/community-preservation-committee>.



Historic Resources

Overview

Arlington is a community that is rich in historic and cultural resources; buildings, landscapes, objects, documents, and other landmarks that attest to the significance of the Town from pre-history to the present. Arlington's central role in events that precipitated the Revolutionary War and industrial development are represented by manmade and natural sites throughout the Town. These resources tell the story of the people who have lived in Menotomy: from the Native Americans, to the European settlers who came nearly 400 years ago, to the citizens of today.

The Town has recognized the importance of preserving these irreplaceable resources in the *Arlington Master Plan, 2015*, which endorsed the following goal:

- Maintain, protect, preserve, and promote historic and diverse cultural resources in all neighborhoods

Current Resources

The Town has three organizations dedicated to preserving these cultural resources: the Arlington Historical Commission, the Arlington Historic District Commissions, and the Arlington Preservation Fund, Inc. In addition, the Arlington Historical Society, a private nonprofit organization, is dedicated to preserving the town's heritage.

The Arlington Historical Commission (AHC) was established by Town Meeting in the 1970s under Massachusetts General Law, Chapter 40, Section 8D as the official town agency responsible for community-wide historic preservation planning. When the Commission was established, Town Meeting also enacted a demolition delay bylaw (Title VI, Article 6) that gives the AHC responsibility to review and act upon any applications for building permits that involve exterior changes to historically or architecturally significant structures in Arlington.

In addition, the Commission:

- Maintains a list of historically significant structures, sites, and features in Arlington
- Encourages appropriate maintenance and restoration of the town's historic structures and open spaces
- Educates and advises municipal departments, boards, commissions, and citizens on historic preservation and the significance of Arlington's architectural landmarks
- Provides guidance and advice to owners of historically significant properties.
- Participates in the management and maintenance of historic resources owned by the Town, e.g., Arlington Town Hall and the Whittmore-Robbins House

The Arlington Historic District Commissions (ADHC) are chartered under Massachusetts General Law, Chapter 40C with regulatory design review within the Town's seven local historic districts. The seven commissions, one for each district, are overseen by six commissioners, including an architect, real estate professional, and a representative from the Arlington Historical Society, plus a resident or property owner from the respective district. The ADHC reviews the architectural appropriateness of exterior design changes to properties located in the seven districts.

The Arlington Preservation Fund, Inc. (APF) is a non-profit corporation whose principal purpose is to make low interest loans to owners of historically significant structures in the town of Arlington, MA. Through these favorable loans, the Fund encourages the retention or restoration of appropriate exterior architectural details during both residential and commercial building projects. This revolving fund was initiated through the Federal Community Development Block

Grant program and is now administered by a volunteer board of nine citizens appointed by the Board of Selectmen.

Approved loans are typically for the repair or restoration, not maintenance, of items which are most essential to the architectural character of the building such as duplication of deteriorated columns, repairing slate roofs, or replacing synthetic siding with wood clapboards or shingles. Loan terms range from three to ten years, dependent on size of loan. A mortgage is required for loans valued greater than \$7,500.

To be eligible a property must be listed as historic - either in a historic district, on the town's historic property inventory or listed on the state inventory of historic properties. Federal law prohibits loans from the fund to religious properties.

Needs and Goals

Documentation of Historic and Cultural Resources

In order to protect the community's historic and cultural resource areas, the Town needs to first identify what resources are present. Over the past three decades, the Arlington Historical Commission (AHC) has documented many of Arlington's historic resources on inventory forms. While these inventory forms include extensive historical and architectural narratives, the majority of these forms and their associated photographs are now more than fifteen years old. Furthermore, the Town still has significant places, objects, and other resources that remain undocumented. Without a record of all of its historic resources, Arlington cannot adequately plan to protect this heritage. Limited or incomplete documentation can hinder the town's effective use of its demolition delay bylaw, which only allows review of buildings that are included in the inventory.

Preservation of Town-Owned Historic Resources

Arlington maintains a unique collection of historic civic buildings and landscapes that serve as visual landmarks and provide valuable public spaces for the community to gather. While many of the town's historic community/civic spaces are well-maintained and utilized, others are in need of significant repair. It is hoped that CPA funds may be judiciously distributed as part of the mix of funding that can preserve these resources.

Areas of Focus

The following is an initial, unapproved list of potential projects for CPA funds. These are not listed in any particular order or preference.

- Initiate a historic and archaeological resources survey plan to identify and protect historic structures, sites and threatened resources.
- Update the 2008 Survey of Arlington's Old Burying Ground. The resulting plan will guide the preservation and restoration of the gravestones, in-ground tombs, walls and other structures and landscape features.
- Develop a conservation plan for the preservation and adaptive reuses of the Central School (Arlington Senior Center).
- Develop a preservation plan for the long-term protection and restoration of the Jarvis House.
- Partner with the Freedom's Way National Heritage Area to research and prepare scholarly documentation of the events and landmarks along the April 19, 1775, battle route to promote Arlington's significance during this event.
- Partner with local historical institutions such as the Arlington Historical Society, the Local History Room at the Robbins Library and the Town to make collections available digitally.

Specific Selection Criteria

In order to receive CPA funding, an historic project should:

- Protect, preserve, enhance, restore and/or rehabilitate historic, cultural, architectural or archaeological resources of significance, especially those that are threatened;
- Protect, preserve, enhance, restore and/or rehabilitate Town-owned properties, features or resources of historic significance,
- Protect, preserve, enhance, restore and/or rehabilitate the historic function of a property or site,
- Support the adaptive reuse of historic properties,
- Demonstrate a specific public benefit; and/or
- Contribute to the long term maintenance and sustainability of a historic resource.

Project proposals should include evidence that the project affects historic resources that are within an Arlington Historic District, on a State or National Historic Register, or eligible for placement on such registers, or on the Arlington Historical Commission Inventory of Significant Resources.

Sample Project

Comprehensive Update of the Historical/Cultural Resources Survey of Arlington

- Create a town-wide survey and inventory of historic properties, neighborhoods and other historic and cultural resources in Arlington.
- Next Steps: Select a vendor and develop a plan for this project for presentation to the CPC.

Community Housing

Overview

With higher than average property values and rental rates, lower income residents face serious financial obstacles that affordable housing can help overcome. By helping those who are struggling to keep afloat during difficult economic times, Arlington recognizes that citizens from all levels of income make up the fabric of our Town and values their ongoing contributions to our community's identity. Additionally, the needs of Arlington's elderly and disabled should never be overlooked.

Current Resources

Public Housing

Arlington has more than 675 units of affordable state subsidized public housing developed and managed by the Arlington Housing Authority (AHA). This inventory includes 175 units of affordable family housing at Menotomy Manor in East Arlington and more than 500 units of affordable elderly housing within four developments throughout the town. The AHA also oversees and administers state and federal rental subsidy programs (HUD's Section 8 Housing Choice Voucher Program and the Massachusetts Rental Voucher Program) and offers a limited amount of special needs housing.

Private Housing

The Housing Corporation of Arlington (HCA) is a not-for-profit corporation that has purchased and developed 90 units of affordable rental housing since 2001, mostly in two-family houses and smaller multi-family properties. HCA also oversees a homelessness prevention program that provides rent and security deposits to income-eligible households.

Millbrook Square is a privately-owned housing complex located in Arlington Center that provides 176 affordable apartments for low-income, disabled and/or elderly residents. Caritas Communities owns and manages two affordable Single Room Occupancy (SRO) buildings in Arlington that provide 37 units with shared kitchen and/or bath facilities to low-income single adults. Lastly, Arlington is home to 81 units (beds) within affordable group homes administered by either the Department of Mental Health or the Department of Developmental Disabilities.

Needs and Goals

Arlington is one of the most densely populated towns in Massachusetts. Coupled with an extremely low vacancy rate, Arlington does not offer many opportunities to develop or preserve housing units that can be made affordable. According to Arlington's Master Plan adopted on February 4, 2015, 5.6% of Arlington's housing stock is considered affordable, well below the Commonwealth's stated goal of at least 10%. Further, according to the U.S Census Bureau, 44% of those who rent their housing in Arlington have low or moderate incomes, and almost 80% are considered "burdened" by their housing costs. Having a "Housing Cost Burden" means that a household is paying more than 30% of their monthly gross income on housing costs. Additional affordable housing units need to be created and/or preserved in order to accommodate the thousands of individuals and families on waiting lists for affordable housing in Arlington and to preserve socio-economic diversity.

As financial assistance from the state has decreased over the years, the Arlington Housing Authority's budget is strained from operational and routine maintenance costs alone. The CPA fund can also be used as an additional resource for the Town to address these mounting issues that affect our elderly, disabled, and low income residents.

Possible Areas of Focus

Per Arlington's February 2015 Master Plan, and as applicable for Arlington's CPA funds, the following steps are recommended in order to meet the Town's broad affordable housing goals.

- Create a Housing Production Plan and submit it to the MA Department of Housing and Community Development (DHCD) for approval. A first draft of this plan will be available in the spring of 2016.
- Allocate local resources, including CPA, CDBG and HOME Program funding, to create and preserve affordable housing that meets the requirements of Chapter 40B.
- Support affordable housing development in central business districts that encourages mixed-uses (multi-family housing with commercial space on the street level) with minimized parking requirements. So called, transit-oriented development will provide opportunities for greater housing density with excellent access to public transit.
- Study the need for and feasibility of increasing the supply of affordable housing to meet the needs of Arlington's over-55 residents, and to address Arlington's and the region's population trends.

Specific Selection Criteria

In order to receive CPA funding, a community housing project should:

- Preserve existing affordable housing by meeting one or more capital need(s) of a property.
- Assist in the financing or construction of new affordable housing, especially:
 - multi-family rental sites,
 - homeownership programs with limited equity and,
 - single-room occupancy (SRO) programs for a special needs populations.

Community Preservation Committee Town of Arlington

2016 Application Process

The Community Preservation Committee (CPC) is pleased to announce that it will be accepting applications for projects to be funded under the Community Preservation Act (CPA) passed last year by the voters of Arlington. Formed in October 2015, the CPC has worked quickly to make Community Preservation funds available for the 2017 Fiscal Year (FY2017) budget cycle. This has, however, shortened the application period for FY2017 with the CPC foregoing any preliminary application and moving directly to the final Application for this budget cycle.

Applications received by noon on February 22, 2016 will be eligible for consideration by the CPC for FY2017 funding at the 2016 Annual Town Meeting. Project applications will be reviewed by the CPC at its regularly scheduled public meetings beginning after the submission deadline. Applications voted on favorably by the CPC will be recommended by the CPC to the 2016 Annual Town Meeting.

Please review the CPA legislation (<http://www.communitypreservation.org/content/textlegislation>) and the Arlington CPA Bylaw (<http://www.arlingtonma.gov/town-governance/lawsand-regulations/town-bylaws/title-ii-committees-and-commissions#Article%2012>) prior to submitting CPA funding applications. The CPC has attached a chart developed by the Massachusetts Department of Revenue to this document as Chart 1 that summarizes allowable spending purposes under the CPA. Applications submitted to the CPC for FY2017 funding must easily fit into one or more of these allowable spending purposes to be considered by the CPC for funding.

Applicants are invited and encouraged to attend the CPC's Public Meeting on January 20, 2016 to ask any questions they may have regarding the application process for FY2017 funding and to ensure their understanding of which projects meet allowable spending purposes.

Step One

Applicants must submit one (1) electronic copy and three (3) hard copies of the [Application](#) to the Community Preservation Committee (CPC) **by no later than Noon on February 22, 2016**, with the electronic copy sent to EMargolis@town.arlington.ma.us and the hard copies to:

Community Preservation Committee c/o Adam Chapdelaine, Town Manager
Town of Arlington, 730 Mass Ave., Arlington, MA 02476

Applications will be date stamped and assigned control numbers in the order that the hard copies are received. The CPC will review submitted applications preliminarily to ensure the proposed projects can be legally funded from Community Preservation funds, and are consistent with the goals for CPA funding as set forth in the Community Preservation Plan.

Please note that submitting an Application does not imply project approval or endorsement from the CPC. Only after reviewing all Applications will the CPC determine which projects to recommend to Town Meeting.

The following information will be required to complete the Application:

- **Goals:** What are the goals of the proposed project?
- **Community Need:** Why is the project needed? Does it address needs identified in existing Town plans?
- **Community Support:** What is the nature and level of support for this project? Include any letters of support and petitions.
- **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.
- **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones?
- **Credentials:** How will the experience of the applicant contribute to the success of this project?
- **Budget:** What is the total budget for the project and how will funds be sourced and spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies. (NOTE: CPA funds may not be used for maintenance.)
- **Other Funding:** What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.
- **Maintenance:** If ongoing maintenance is required for your project, how will it be funded?
- **Impact on Town Budget:** What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

Additional information, as applicable, may also be required. Such as:

- **Control of Site:** Documentation that you have control over the site, such as a Purchase and Sales Agreement, option or deed. If the applicant does not have site control, explain what communications have occurred with the bodies that have control and how public benefits will be protected in perpetuity or otherwise.
- **Deed Restrictions:** In order for funding to be distributed, an appropriate deed restriction, meeting the requirements of Chapter 184 of Mass General Laws pursuant to section 12 of the Community Preservation Act, must be filed with the CPC. Provide a copy of the actual or proposed restrictions that will apply to this project.

- **Acquisitions:** For acquisition projects, attach appraisals and agreements if available. Attach a copy of the deed.
- **Feasibility:** Provide a list of all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning approvals, and any other known barriers to moving forward.
- **Hazardous Materials:** Provide evidence that the proposed project site is free of hazardous materials or there is a plan for remediation in place.
- **Permitting:** Provide evidence that the project does not violate any zoning ordinances, covenants, restrictions or other laws or regulations. What permits, if any, are needed for this project? Provide the expected date of receipt for necessary permits, and copies of any permits already acquired.
- **Environmental Concerns:** Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the boundaries of your submission.
- **Professional Standards:** Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed. Evidence that the applicant and the project team have the proven or potential capacity to conduct the scope and scale of the proposed project, as evidenced by project leaders with appropriate qualifications and technical experience or access to technical expertise.
- **Further Attachments:** Assessor's map showing location of the project.

Applicants will present their projects at the CPC Public Meeting in mid-March (tentatively March 14, 2016) and address questions from Arlington residents. It is required that information about the project be in writing and copied for distribution and review at the Public Meeting. This is also an opportunity for project sponsors to ask the CPC any questions regarding the application process.

One (1) electronic copy and three (3) hard copies of the Application must be submitted to the CPC by no later than Noon on February 22, 2016 in order to be considered for the 2016 Annual Town Meeting. Applications will be date stamped and assigned control numbers in the order that the hard copies are received.

Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, applications will not be accepted after the deadline. **In order for the CPC to consider a project proposal that cannot adhere to the deadline as outlined in the Application Process, the project must meet the additional selection criteria as outlined in the Special Application Process.**

The CPC will review the Applications. Applicants will be contacted if additional information or an interview is required. The CPC may also request to visit the site of the proposed project. Applicants will be notified in late March or early April whether the CPC plans to recommend their project at the 2016 Annual Town Meeting.

Step Two

Upon receiving notice that the CPC intends to present their project to Town Meeting, a selected applicant will submit an electronic copy of a summary of their project for distribution by CPC to certain Town bodies. The CPC will consult with the Board of Selectmen, the Capital Planning Committee, the Finance Committee, the Redevelopment Board and the Planning Department staff regarding the selected projects. The CPC will then reassess each project during a CPC Meeting in late March or early April 2016. The CPC will review the outcome of any Town board advisory meetings and examine whether sponsors have performed sufficient research to identify the secondary budgetary effects of their projects.

The CPC reserves the right to withdraw its support for any proposed project at this CPC Meeting or at any point prior to the 2016 Annual Town Meeting.

Any PowerPoint slides intended to be used for the 2016 Annual Town Meeting will be submitted in early April 2016.

Step Three

The CPC will present the articles for each of the recommended projects at Town Meeting for discussion and vote. It is expected that the selected applicants will give a brief five minute presentation on their project and answer questions from Town Meeting members. Town Meeting has the final authority to award the CPC's recommended funds from Arlington's Community Preservation Act Fund.

Step Four

Funding will be available for Approved Projects following an affirmative vote of Town Meeting, starting July 1, 2016 of the applicable fiscal year.

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors are required to meet with Arlington's Town Manager before the Town will enter any into contracts or issue any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

All CPA funds are administered and disbursed by the Town of Arlington. Project management, oversight, execution, and financial control will be under the control of the Town Manager or his designee.

For more information regarding **Funding Process**, refer to the Community Preservation Plan.

The CPC requires periodic status updates from the recipients of CPC funding. Updates will occur no less than annually and upon project completion. Written updates will be coordinated by the liaison to the CPC. The purpose of such update is to aid the CPC in refining the CPA Plan, in identifying issues that may assist future applicants, and in reporting progress to the Town.

Projected 2016 CPA Timeline

January 20, 2016 Public Meeting - 7:00 pm

February 22, 2016 Applications Due – Noon

March 14, 2016 (tentative) Project Presentations

Late March / Early April 2016 CPC Selects Projects

Early April 2016 PowerPoint Files Due (if applicable)

Late April 2016 Town Meeting

If you have additional questions about this process, please contact:

Community Preservation

781-316-3005

-or-

Eve Margolis

EMargolis@town.arlington.ma.us

The following is a list of the appointed committee members:

Clarissa Rowe, Chair

Selectmen Appointee

Eric Helmuth, Vice Chair

Selectmen Appointee

Chuck Tirone

Conservation Commission Designee

Michael Cayer

Redevelopment Board Designee

JoAnn Robinson

Historical Commission Designee

Richard Murray

Housing Authority Designee

Andrew Bengtson

Selectmen Appointee

Leslie Mayer

Park & Recreation Commission Designee

David Levy

Selectmen Appointee

Community Preservation Committee

Town of Arlington

Special Application Process

Use of the **Special Application Process** is only granted by the CPC under the unique circumstances that a significant opportunity would otherwise be lost if the application were to be processed using the standard timeline (as outlined in the **Standard Application**).

The CPC will allow an applicant to utilize the **Special Application Process** only if the project meets the General Selection Criteria of the Community Preservation Plan, the Specific Criteria for the affected community asset category, and the following additional criteria:

- The proponents were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify the opportunity prior to the **Application Deadline** of Noon on February 22, 2016.
- The applicant has either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- The project is supported by one or more Boards with responsibility for projects of a similar nature.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out to the benefit of the Town, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.
- The project holds a high priority in the Master Plan, the Housing Plan, the Open Space and Recreation Plan, or other planning documents currently accepted and utilized by the Town.

Should the CPC grant use of the **Special Application Process**, the CPC will continue to adhere to the applicable procedures as outlined in the **Standard Application Process**. Only the pertinent submission and hearing deadlines will be changed in order to accommodate the unique conditions surrounding the proposed project.

If the timing of the application is such that the CPC cannot meet the deadline for the Annual Town Meeting, the applicant or the Selectmen must call a **Special Town Meeting** for the purpose of considering the appropriation of CPA funds for the proposed project. The CPC will not be responsible for recommending a **Special Town Meeting** or any other changes in the Town's calendar.

Community Preservation Committee Town of Arlington

Funding Process

Initial Documentation

Following approval from Arlington's [Annual Town Meeting or Special Town Meeting](#), the Community Preservation Committee will notify grant recipients of the funding that has been awarded. This award letter will outline any terms, funding conditions, or additional instructions applicable to the approved CPA grant. A confirmation of receipt must be returned to the CPC as proof that project sponsors received the procurement procedures and accepted the terms and conditions outlined in the award letter.

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors are required to meet with the Town Manager's staff before the Town will enter any into contracts or issue any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

Should a property or artifact that has benefitted from CPA funding be sold or given to a new owner within five years of the award letter's issuance date, the CPA fund must be reimbursed the entire amount awarded unless the CPC waives this requirement in part or in its entirety.

Supplementary contracts may be required by the Town Manager's Office, depending on the details of the approved project. For construction projects, recipients of CPA funds and all contractors on the project may be asked to have their general liability insurer add the Town of Arlington as an additional insured. Proof of this coverage must be submitted to the CPC before any invoices can be paid using CPA funds. Projects on Town owned properties that are already required to indemnify the Town may be asked to reconfirm coverage before any invoices can be paid.

Updates to the CPC

Grant recipients will notify the CPC when work on projects has commenced and submit periodic project status updates. Progress Reports will be submitted to the CPC and incorporated into the Annual Town Meeting CPA package. Approved projects will be carried out in accordance with the terms outlined in the award letter and any supplementary contracts from the Town. Any significant deviations from the project as presented in the original [Application](#) must be approved by the CPC to ensure that such changes are CPA-eligible expenditures and within the scope of the project as approved by Town Meeting.

Grant recipients should contact the [Community Preservation Committee](#) at **781-316-3005** or **Eve Margolis** at EMargolis@town.arlington.ma.us to notify the CPC of any significant changes to their projects.

Expenditures

Invoices will be submitted to the CPC for their approval. Approved expenditures will be processed through the Town Comptroller's Office and paid through the Treasurer's Office. Any funds for a CPA project that remain at the completion of work will return to the general CPA fund once the project is officially closed. The remaining funds will then be re-appropriated at the next Town Meeting, unless the CPC votes to approve the use of remaining funds for the completion of additional related work. In such cases, approval will be dependent upon whether the additional proposed work is within the general scope and intent of the original [Application](#).

Closing Process

CPA grant recipients will notify the CPC in writing through a Final Progress Report when work is completed for their project. Once this notification is received, the CPC will review the initial acceptance letter to make sure that all terms and conditions have been met. The CPC will schedule a final site visit as appropriate with the CPA grant recipient to examine and photograph the completed work. If a final site visit is not appropriate for the project, the CPC may accept photographs or hardcopies of the deliverable as additional proof that the CPA project has been completed. The CPC will also generate a final summary of the CPA fund expenditures for the project. Once all tasks have been performed, the CPC will vote to officially close the project file.

Once the project file is officially closed, the CPC will work with the Town Comptroller to return any unexpended funds to the general CPA fund. **Projects must be officially closed before June 30 of the current year for the funds to be available for re-appropriation at the following year's Town Meeting.**

Additional Requirements

CPA grant recipients are required to acknowledge the Community Preservation Act in all press releases, publicity materials, news, and written or oral announcements about work supported by CPA funds.

Projects receiving CPA funds must be completed within 30 months following the Town Meeting approval, unless the CPC votes to approve an extension of time due to compelling and documented circumstances. Without such support, the CPC may recommend to rescind any remaining CPA funds at a subsequent Town Meeting.

Community Preservation Committee Town of Arlington

CPA Funding – 2016 Application

One (1) electronic copy and three (3) hard copies of the completed [Application](#) must be submitted to the CPC **by no later than Noon on February 22, 2016 in order to be considered for the 2016 Annual Town Meeting**, with the electronic copy sent to EMargolis@town.arlington.ma.us and the hard copies to:

**Community Preservation Committee c/o Adam Chapdelaine, Town Manager
Town of Arlington, 730 Mass Ave., Arlington, MA 02476**

Applications will be date stamped and assigned control numbers in the order that the hard copies are received.

Project

Title _____

Applicant/Contact

Person _____

Organization _____

Mailing Address _____

Telephone _____

E-mail _____

Signature _____ **Date** _____

CPA Category (*check all that apply*):

Community Housing Historic Preservation

Open Space Recreation

Amount Requested _____

Total Project Cost _____

PROJECT DESCRIPTION: Attach answers to the following questions. Applications will be returned as incomplete if all requested information is not provided. Include supporting materials as necessary.

1. **Goals:** What are the goals of the proposed project?
2. **Community Need:** Why is the project needed? Does it address needs identified in existing Town plans?
3. **Community Support:** What is the nature and level of support for this project? Include letters of support and any petitions.
4. **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.
5. **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones?
6. **Credentials:** How will the experience of the applicant contribute to the success of this project?

7. **Budget:** What is the total budget for the project and how will funds be sourced and spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies. (NOTE: CPA funds may not be used for maintenance.)
8. **Other Funding:** What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.
9. **Maintenance:** If ongoing maintenance is required for your project, how will it be funded?

10. **Impact on Town Budget:** What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

ADDITIONAL INFORMATION: Provide the following additional information, as applicable.

1. **Control of Site:** Documentation that you have control over the site, such as a Purchase and Sales Agreement, option or deed. If the applicant does not have site control, explain what communications have occurred with the bodies that have control and how public benefits will be protected in perpetuity or otherwise.
2. **Deed Restrictions:** In order for funding to be distributed, an appropriate deed restriction, meeting the requirements of Chapter 184 of Mass General Laws pursuant to section 12 of the Community Preservation Act, must be filed with the CPC. Provide a copy of the actual or proposed restrictions that will apply to this project.
3. **Acquisitions:** For acquisition projects, attach appraisals and agreements if available. Attach a copy of the deed.
4. **Feasibility:** Provide a list of all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning approvals, and any other known barriers to moving forward.
5. **Hazardous Materials:** Provide evidence that the proposed project site is free of hazardous materials or there is a plan for remediation in place.
6. **Permitting:** Provide evidence that the project does not violate any zoning ordinances, covenants, restrictions or other laws or regulations. What permits, if any, are needed for this project? Provide the expected date of receipt for necessary permits, and copies of any permits already acquired.
7. **Environmental Concerns:** Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the boundaries of your submission.

8. **Professional Standards:** Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed. Evidence that the applicant and the project team have the proven or potential capacity to conduct the scope and scale of the proposed project, as evidenced by project leaders with appropriate qualifications and technical experience or access to technical expertise.
9. **Further Attachments:** Assessor's map showing location of the project.

REMINDER: Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors will be required to meet with Arlington's Town Manager before the Town enters into any contracts or issues any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)

Chart 1

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
DEFINITIONS (G.L. c. 44B, § 2)	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of the city or town	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field Does not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Housing for low and moderate income individuals and families, including low or moderate income seniors Moderate income is less than 100%, and low income is less than 80% of US HUD Area Wide Median Income
ACQUISITION	Yes	Yes	Yes	Yes
Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B				
CREATION	Yes		Yes	Yes
To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)				
PRESERVATION	Yes	Yes	Yes	Yes
Protect personal or real property from injury, harm or destruction				
SUPPORT				Yes, includes funding for community's affordable housing trust
Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable				
REHABILITATION AND RESTORATION	Yes if acquired or created with CP funds	Yes	Yes	Yes if acquired or created with CP funds
Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties				